



BLACK GOLD

COOPERATIVE LIBRARY SYSTEM

580 Camino Mercado
Arroyo Grande, CA 93420
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Blackgold.org

AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE AGENDA August 3, 2022– 10:00 a.m. - Video Webinar – ATS Ops

<https://blackgold.webex.com/blackgold/j.php?MTID=mc6c00e9d264a125f0788425caca2d8a3>

Meeting number: 625 911 376

Join by phone

1-650-479-3208 Call-in toll number (US/Canada)

Access code: 625 911 376

* Item accompanies the agenda

1) 10:00 A.M. CALL TO ORDER Glynis Fitzgerald, Chair, Presiding
Recorder; Kristina Uvalle (BG)

2) ADOPT AGENDA —

3) *APPROVE MINUTES — July 6, 2022, by Glynis Fitzgerald (BG)

4) CIRCULATION –

a) My Libro demo

b) *Preferred Name (PR)

c) Circ Manual update

5) ILL –

a) Aspen issues

i) Book Club Kits – Discussion Questions can now be added as a supplemental file in the staff view on an item record.

ii) Changing Background colors on Aspen page – Custom changes (outside the options listed under Theme) to background colors are available upon request.

iii) Updating library hours and closed dates – Any changes to open/closed days must first be changed in Koha (Tool>Calendar) and then updated in Aspen (Locations).

b) Koha issues

i) New itypes – New item types can be added by jurisdiction in 3 steps. New itype is added, library updates circ rules and Aspen update format matrix.

ii) Park Passes – do you want them visible only in the home catalog?

iii) Item Circulation Alerts – email/text notices for check-in and check-out of items.

iv) Claimed Returned items - items are marked as returned when flagged as lost

v) Item fields for possible suppression – (Karen's list) Still need responses?

vi) Holds date issues – Goleta is having issues with holds pick-up dates changing. Anyone else?

6) BLACK GOLD UPDATE

- a) CENIC Update (MD)
- b) EDI Status (GF)

7) ROUNDTABLE

8) ITEMS TO BE FORWARDED — (To Council or other committees)

9) AGENDA BUILDING

10) NEXT MEETING — 10:00 a.m., Wednesday, September 7, 2022 (SM)

11) ADJOURNMENT

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org): Karen Christiansen, PR; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Carla Mason, GO; Eric Castro, CC; Justin Formanek, SP; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];



**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE MINUTES
July 6, 2022– 10:00 a.m.
Video Webinar – ATS Ops**

- 1) **10:05 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding
Recorder; Glynis Fitzgerald (BG)
- 2) **ADOPT AGENDA** — 1st SM/ 2nd PR Approved
- 3) ***APPROVE MINUTES** — January 5, 2022, by Kristina Uvalle (BG)
1st SM/ 2nd PR Approved.
- 4) **FUTURE ATS MEETINGS** – Decide on meeting times, dates, and locations for future meetings.
Decide on agenda format and topics.

Group agreed to meet once a quarter in person, the rest of the meetings will be webinar format. Santa Maria library has COVID outbreak right now so everyone is in masks, so group agreed that the in-person meetings will be dependent on COVID status at the time. August will be webinar and September will be in person. Kristina will handle setting this up.

Group agreed to keep the agenda format and topics the same as they have worked in the past.
- 5) **CIRCULATION** – Discuss plan to update Circulation Manual to reflect changes in the Cooperative with the exit of SLO and SB, and the change to Aspen/Koha from Polaris.

Kristina will send out the current Circ manual in WORD format and all libraries will review and update items pertaining to their own libraries

Libraries will review the manual for any changes needed based on the new Koha ILS. This will be an ongoing discussion at the next few meetings
- 6) **ILL** –
 - a) Aspen issues

GF asked if any libraries would like any changes or having any problems. The group was ok with Aspen and how it is working.

GF mentioned that KU is working on Book Club Kits and adding a button to click for supplemental
 - b) Koha issues

Karen mentioned that there are just too many clicks in Koha

Karen would like to suppress most of the fields in cataloging since staff doesn't need to enter information into all of them. GF mentioned that Teresa is working with ByWater to streamline this functionality, and asked Karen to submit to the group screenshots of which fields she would like suppressed.

PR would like the "current library" column suppressed in Cataloging. Dominic suggested that the field might be better labeled as "in transit"

GF asked if any of the libraries need any additional reports that they have been accustomed to getting from Polaris. No one needs additional reports at this time.
- 7) **BLACK GOLD UPDATE**

GF said that delivery is now Tuesdays and Fridays with both the North and South route drivers. Later this month, the expectation is that Kevin, the Southern route driver will be driving the entire

route (South-to-North-to South). The Northern driver, Jim, might start driving a route for the SLO libraries.

8) ROUNDTABLE N/A

9) ITEMS TO BE FORWARDED — (To Council or other committees) N/A

10) AGENDA BUILDING – N/A

11) NEXT MEETING — 10:00 a.m., Wednesday, August 3, 2022 – Webinar

12) ADJOURNMENT – at 11:19 a.m. 1st PR/2nd SP. Approved.

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MEETING DATE:	8/3/22	ESTIMATED TIME FOR ITEM:	15 minutes
TITLE OF ITEM:	Preferred Name	PRIORITY LEVEL: (1-Low 3 – High)	<input type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input type="checkbox"/> 3
SUBMITTED BY:	Karen @ Paso		
TYPE OF ITEM:	<input type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Decision/Request Motion <input type="checkbox"/> Other: _____		
BACKGROUND STATEMENT			
BACKGROUND: <i>Describe why you are bringing this item before council. What problem are you trying to solve? List information that would be helpful for decision making such as committee recommendations, pros/cons.</i>	<p>We have several/ many patrons who use a name other than their legal name on their cards/signature, etc. In Polaris, we used to just change the name to what they go by, but we have more options in Koha. We would like to propose using the preferred name in the first name field (could be in quote marks like “Jane”) and then having the legal name in the other name field (with no quote marks like Jennifer).</p> <p>Pros: Patron name would display as what they go by – more user friendly. Differently gendered folks could have preferred name front and center.</p> <p>Cons: Would require changing info when scanning DLs. If quote marks are used, they would show on billing notices.</p>		
OUTCOME(S)			
DESIRED OUTCOME(S): <i>Describe your desired outcome(s)</i>	Change circ manual to reflect the change.		
OTHER COMMENTS:			